

Responding to Resident & Nonresident Markets is Key to Strategy

The years 2003-2007 offer tremendous opportunity for tourism and recreation in Montana. The Lewis & Clark Bicentennial is projected to be one of the largest tourism events in recent years. If those projections are realized, the Bicentennial can serve to enhance Montana's economy and create jobs, but it also can create many challenges. The key to exploiting the Bicentennial in a positive way – and all tourism opportunities in Montana – is to focus strategically on sustainable tourism that meets the needs of both Montanans and nonresident visitors in a changing tourism marketplace.

It is clear that Montanans view tourism as an essential component of the state's economy; however, they desire to focus on the kinds of tourism that maximize benefits to their communities and businesses, while minimizing impacts on their own outdoor recreation experiences, and on Montana's outstanding natural, historic and cultural assets.

This chapter defines both the context for, and the components of, the tourism and recreation strategy for Montana. The context is expressed in four dimensions:

- ◆ Vision
- ◆ Guiding Principles
- ◆ Market-Driven Approach
- ◆ Strategic Goals

The 2003-2007 Montana Tourism and Recreation Strategy is presented in its four key components:

- ◆ Strategic Framework
- ◆ Organization and Roles (for Management and Implementation)
- ◆ Objectives and Actions (Chapter 5)
- ◆ Implementation and Accountability (Chapter 6)

This chapter explains the strategic framework for the Plan, the emphasis on market-driven, sustainable tourism, and key partner organizations and their roles. Chapter 5 provides details about the Plan's top priority objectives and actions, and Chapter 6 explains the implementation steps and timeline to accomplish the strategic goals, objectives and actions.

Chapter 4:

The 2003-2007

Montana Tourism & Recreation Strategy

- A. Strategic Vision
- B. Guiding Principles
- C. Market-Driven Approach
- D. Strategic Goals
- E. Strategic Framework
- F. Organization & Roles

"No amount of sophistication is going to allay the fact that all of your knowledge is about the past and all of your decisions are about the future."

"Tourism and recreation are crucial components of a healthy society, just as essential as other state services such as schooling, sanitation, and justice. The vision for tourism and recreation in Montana should reflect that."

- Citizen at one of eight Strategic Plan public meetings

Strategic Vision for Tourism

It is the year 2007. Tourism and recreation in Montana has achieved the following:

Balance: between Montana's character/assets and needs of visitors/communities

Cooperation: between public-private-tribal-nonprofit groups to work as a team on common goals

Support: funding for marketing, support services, mgmt of assets, technical assistance

Respect: recognition of economic & social benefits of tourism

Accountability: comprehensive evaluation system to track & measure results/impacts

A. The Strategic Vision

Montanans have varied opinions about tourism and its direction in their state. In order to establish a strategic direction for this Plan, the planning team asked Montanans about their vision for the future of tourism and recreation. There was surprising consensus about the key elements of that vision, as expressed by Montanans from a wide variety of perspectives, sectors and geographic locations. The vision statement has five components which present a "desired future condition" for tourism and recreation in Montana:

It is the year 2007. Tourism and recreation in Montana has achieved the following:

Balance. Montana's unique character and sense of place are retained while providing quality experiences for both residents and nonresident visitors. Montana's rich natural, historic and cultural assets are managed for sustainable levels of visitation in a manner consistent with responsible, shared use. Communities that desire tourism are benefiting from new revenue and jobs, while retaining their community integrity and heritage. Montana is known for its diverse, high quality natural, historic, and cultural tourism and recreation experiences, and the friendly professionalism of its people.

Cooperation. Effective public-private-nonprofit-tribal partnerships are engaged in visionary, collaborative planning and implementation efforts which foster economic growth and stability, while respecting the values of Montanans. The private sector, community development organizations, supporting public agencies and the nonprofit sector are working as a team, tapping limited resources more effectively through their strategic, collaborative efforts.

Support. Sufficient financial and technical assistance are available from various sources to support effective tourism marketing/research, management of natural/historic/cultural assets, and business development. Tourism is integrated into Montana's education and workforce training systems. Stable funding sources that do not diminish tourism marketing funds are available to develop and maintain infrastructure for tourism and recreation needs.

Respect. Tourism is recognized as an essential element of Montana's economy. It is appreciated by Montana citizens and elected officials for its financial and social contributions to the State. The Lewis & Clark Bicentennial Commemoration has concluded successfully, leaving important lasting legacies for Montana residents, as well as continuing opportunities for businesses and visitors.

Accountability. A comprehensive evaluation system is being used to measure the success and the impacts of tourism development and marketing, consistent with the strategic goals and objectives. Information about visitation trends, impacts and visitor research are widely distributed to provide businesses and agencies the information they need to make good management decisions, and to be responsive to changing customer tastes and preferences.

B. Guiding Principles

There are many ways to “do” tourism. Across the board, Montana businesses, citizens and stakeholder groups who participated in the planning process expressed that tourism in Montana should be a high quality experience which respects and celebrates Montana’s unique heritage and character, not a “tacky tourist trap.” They also want tourism to be sustainable: tourism should contribute to the economy without sacrificing long-term benefits for short-term profits. Tourists should not degrade the state’s extraordinary natural, historic and cultural assets.

Therefore, the Montana Tourism & Recreation Strategic Plan is guided by the following six principles. These guiding principles reflect the values, or “moral compass,” expressed by Montana citizens in the public meetings, online survey, and other outreach efforts conducted by the planning team. They are the criteria against which tourism and recreation strategies will be evaluated and prioritized. In brief, all programming and actions should adhere to these guiding principles.

- ♦ Serve the needs of Montanans first: retain Montana’s character, sense of place and assets while providing economic benefits for citizens and businesses
- ♦ Manage for sustainable, high-quality visitor experiences: practice good stewardship
- ♦ Maximize economic and social benefits by targeting high-value, low impact visitors
- ♦ Retain local control of decision-making about types and quantities of visitors to invite
- ♦ Respect diverse needs, perspectives and concerns in tourism planning and promotion
- ♦ Collaborate to resolve issues through positive, inclusive, solutions-based processes

If tourism and recreation planners, marketers and stakeholders adhere to these principles as they implement strategic actions over the next five years and beyond, Montana can achieve the vision for tourism outlined in the previous section.

"We need to capitalize on present as well as historic attractions - we should not become a "tourist trap," i.e. building things for tourism's sake only. Plan ahead to conserve our culture while offering hospitality."

- Public meeting participant



Moss Mansion

Guiding Principles for Strategic Plan

- Serve Montanans' needs first
- Manage for sustainability
- Maximize economic & social benefits
- Retain local control
- Respect diverse needs & perspectives
- Collaborate to resolve issues

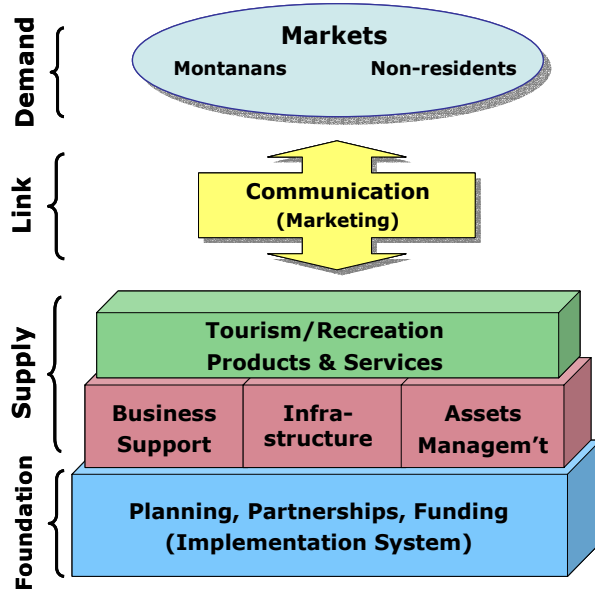
C. Market-Driven Approach

The strategic approach for the Montana Tourism & Recreation Strategic Plan is *market-driven*, as depicted in Figure 4.1. Tourism planning, development and promotion must meet the needs of both Montanans and nonresident visitors within the context of the guiding principles.

In figure 4.1, Montanans and nonresidents are the markets, or “Demand”. The product, or “Supply”, is the tourism and recreation products and services offered or managed by the public, private and nonprofit sectors (parks, forests, hotels, restaurants, tours, events, airlines, museums, etc.). The quality and success of the product depends upon the building blocks of effective business support services (technical, financial), adequate infrastructure to support tourism and recreation (transportation, signs, restrooms, telecommunications services, etc.), and balanced management of Montana’s natural, historic, and cultural assets. The “Foundation” of the system is effective, informed planning and partnerships, with adequate funding for implementation.

The link between Supply and Demand is communication: marketing, promotion and public relations. In order to achieve the tourism vision, communications must be strategic, targeting high-value, low-impact visitors as defined in the Target Markets section of Chapter 3.

Fig. 4.1: Market-Driven Approach



Notes:

Infrastructure refers to tourism-related facilities, signs, visitor centers, transportation, utilities, etc.

Assets Management refers to sustainable management of Montana's natural, historic and cultural assets.

"I wish Montana could be seen/presented as a progressive place with a balance between history, the Wild West, home to Native peoples and a place where educated successful people can find mental & physical relaxation and rejuvenation."

- Public meeting participant



Amtrak Station

D. Strategic Goals

There are seven broad goals toward which action will be focused to attain the vision for 2007:

1. Enhance awareness and support for tourism and recreation among Montana citizens and elected officials, including additional funding sources to support sustainable tourism.
2. Increase four-season tourism revenues in all regions of the state, through enhancement of products/services that focus on high-value, low-impact visitors, especially heritage and cultural tourists.
3. Implement a more coordinated, proactive system to manage, enhance and protect Montana's natural, historical and cultural assets with balanced, sustainable levels of resident and nonresident visitor use.
4. Improve and maintain tourism and recreation infrastructure to support high quality resident and nonresident visitor experiences.
5. Nurture desirable business growth and diversification in the tourism and recreation industry through business support services and technical assistance.
6. Communicate with the markets through highly targeted promotions that increase awareness and attract desirable tourists; measure, track and evaluate tourism results and trends.
7. Build an effective tourism and recreation "team" to facilitate partnerships, share information and leverage funding/technical resources in order to realize the vision for 2007.

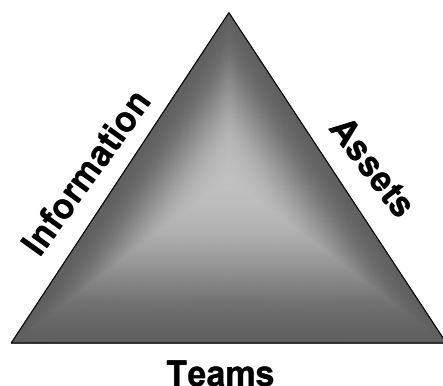
The next two sections describe a strategic framework and organizational system that provides the structure to achieve the seven goals. Chapter 5 provides details about specific objectives and actions required to accomplish them. Chapter 6 describes a step-by-step implementation program, including timeline, responsible organizations and potential resources to pay for actions.

Tourism Strategic Goals

1. Enhance awareness & support for tourism, including funding.
2. Increase 4-season benefits in all regions, enhance products/services.
3. Implemented system to manage & protect assets w/ sustainable use.
4. Enhance & maintain infrastructure.
5. Provide business support services.
6. Communicate with markets, track & evaluate results.
7. Build an effective team, partnerships to realize vision for 2007.

"'Tourism' should be a respected and understood industry by all Montana citizens, not just the motels, B&Bs, restaurants, convenience stores and gas stations. The economic importance of tourism should be well publicized and explained to all sectors of Montana. Tourism funds schools, cities, all tax supported government activities. Employees of these entities have to understand where the money comes from and welcome it."

- Public meeting participant



Strategic Framework Elements

▪ Managing Information:

- Awareness-building/lodging tax
- Promotion, public relations, packaging
- Tracking & research
- Info-sharing: collect/disseminate

▪ Managing (Use of) Assets:

- Balance between asset protection & visitor/business needs
- Access to public/private lands
- Transportation system & signs
- Good stewardship of natural/historic/cultural assets, limits
- Visitor information/interpretation
- Enhanced communities, facilities

▪ Creating Teams:

- Linkages between agriculture & tourism
- Partnerships to address asset mgmt
- Business assistance
- Entrepreneurial opportunities
- Enhanced "edu-structure"
- Funding partnerships/other sources
- Effective Plan implementation

E. Strategic Framework has 3 Elements: Information, Assets & Teams

To accomplish the strategic goals, the planning team worked with Montana's tourism and recreation stakeholders to identify specific objectives and actions. The seven goals originally generated forty-two objectives and one hundred and fifty specific actions. Those objectives and actions were then prioritized, consolidated and grouped into three key elements that make up the strategic framework:

1. Managing Information
2. Managing (the Use of) Assets
3. Creating Teams

Managing information means the collection and dissemination of strategic information, including actions to address visitor information/interpretation, promotion/public relations, tracking of results, research, awareness-building and information-sharing/exchange.

Managing the use of assets means assuring sustainability through actions that address Montana's transportation system, access to public/private lands and waters, balance between asset protection and business development, good stewardship of natural/historic/cultural assets through reasonable limits, entrepreneurial opportunities, enhancing communities/local facilities, and developing new products/services to meet the needs of targeted markets. As visitation, or use, increases, the level of management also must increase ("the more guests you have in your home, the more you must vacuum the carpet").

Creating teams means building partnerships to implement actions that address continued/enhanced funding through the lodging tax and other sources, coordination among agencies, business assistance, and enhancing Montana's "edu-structure" to support tourism. The key to effective implementation of the Strategic Plan actions is to build stronger collaborative teams at the state and regional levels between private, public, tribal and nonprofit sector partners.

The next section discusses how those teams will be formed or enhanced, along with their roles and relationships.

F. Organization and Roles

F.1 Enhanced Teams are Needed at the State and Regional Levels to Achieve Goals

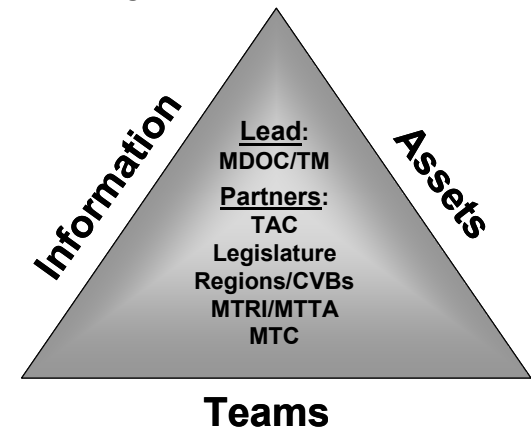
Montana's tourism promotion and development program has been highly successful and is the envy of many other states. As described in Chapter 2, growth in tourism over the past decade has been extraordinary. However, some of the growth has produced challenges for managers of major attractions, and for Montanans who are accustomed to having their state's assets "all to themselves." Moreover, as described in Chapter 3, markets are changing, and some of those changes require new approaches to respond effectively to market needs.

During the past decade, Montana's lead tourism players at the state and regional levels have focused primarily on promotion activities – building Montana's image and "getting the word out" beyond the state's borders. Their successes are evidenced by the numbers. In order to be responsive to the *future* needs of Montanans, and to changing markets, a broader, more collaborative role is needed in the next five years. Effective implementation of this Strategic Plan – to best serve the customer and the tourism industry (private, public, tribal and nonprofit stakeholders) – requires enhanced partnerships and teams.

Tourism is an important economic development strategy for Montana, yet too often, there is little communication or collaboration between state/regional tourism organizations and representatives from other economic sectors (agriculture, ranching, mining, technology, manufacturing, conservation, the arts). Many economic development professionals have limited knowledge about tourism and its current or potential benefits to communities. At the local level, regional tourism organizations have not been strong "players" or facilitators for tourism's role in regional/local planning and economic development efforts. So, often there is no "voice" for tourism in economic development - *tourism is not a partner* – and therefore is ignored. This lack of awareness about tourism has implications in the political arena, when public policy and funding decisions are made.

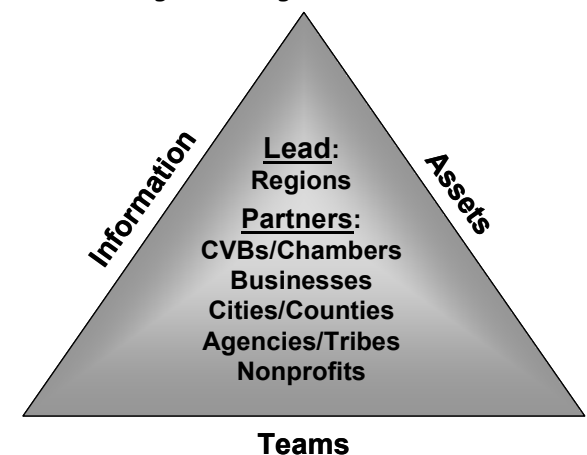
Therefore, it is important to create enhanced partnerships and teams both at the state and the regional levels. At the state level, the Montana Department of Commerce (DOC) Promotion Division (Travel Montana, or TM) is the lead agency (Figure 4.2). Key partners include the Tourism Advisory Council (TAC), Legislature, Tourism Regions, Convention & Visitors Bureaus (CVBs), University of Montana Institute of Tourism and Recreation Research (ITRR), the Montana Tourism & Recreation Initiative (MTRI, a state and federal

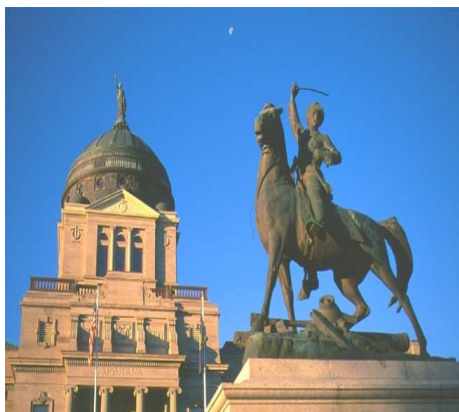
Fig. 4.2: State Level Team*



* DOC = MT Dept. of Commerce; TM = Travel Montana; TAC = Tourism Advisory Council; CVBs = Convention & Visitors Bureaus; MTRI = MT Tourism & Recreation Initiative (inter-agency planning group including TM; FWP; MDT; MHS; MLCBC; HPDC; DNRC; MT Arts Council; TAC; U of MT; MSU; USFS; BLM; USFWS; COE; NPS; BOR; BIA); MTTA = MT Tribal Tourism Alliance; MTC = MT Tourism Coalition.

Fig. 4.3: Regional Level Team





State Capitol, Helena

*"Long range regional/county/
community planning needs coordination
on overlapping issues."*

- Public meeting participant

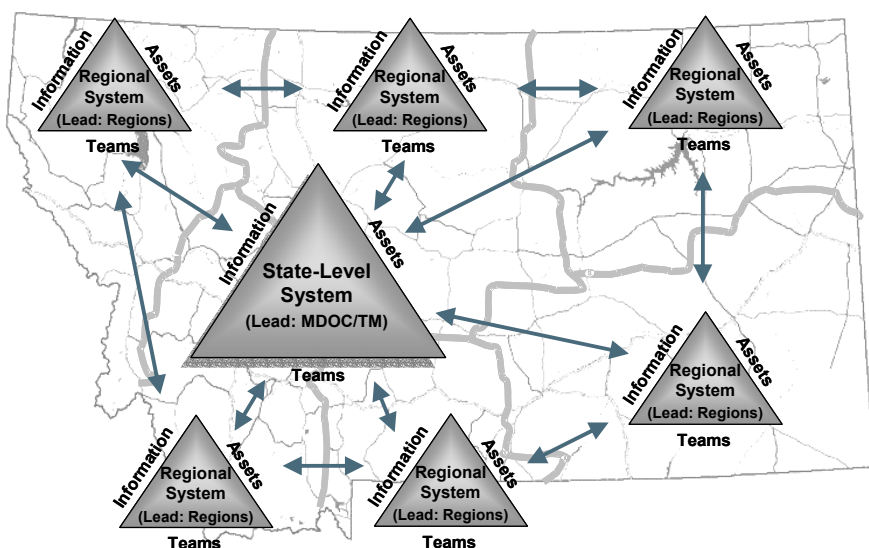
inter-agency planning group), the Montana Tribal Tourism Alliance (MTTA) and Montana Tourism Coalition (MTC, a private-sector coalition). Implementation of the strategic actions described in Chapter 5 will require that this state-level team be expanded to include agencies and organizations who traditionally have not been involved in tourism (see next section).

At the regional level, the Tourism Regions are the lead entity (Figure 4.3, previous page). Key partners include CVBs, chambers of commerce, businesses, cities, counties, local agency offices, tribes and nonprofit organizations (museums, cultural groups, events, etc.). At this level, too, the cast of characters needs to broaden in order to implement strategic actions.

F.2 Many Players & Stakeholders Have Important Roles in the Strategic Plan

The state and regional tourism management teams described in the previous section are the "core team" of players in the statewide tourism management network. But others need to be part of the process for the strategic goals to be achieved successfully. Each of these teams must expand their "rosters" and create a network that includes a state-level system of implementation partnerships, and six regional-level systems of implementation partnerships (Figure 4.4). Consistent cooperation and expanded collaboration among these entities, operating as a team, will ensure that the Strategic Plan does not just sit on a shelf.

Fig. 4.4: Statewide Tourism Management Network



At the state level, key partners outside the "core team" who need to be involved include other state and federal agencies, tribal representatives, legislative leadership or committee staff, statewide business trade associations, statewide economic development agencies and programs, statewide arts/cultural/historic organizations, and statewide wildlife/sportsmen's/conservation groups.

Sidebar 4.1 on page 80 lists many of the public, private and nonprofit tourism stakeholder groups. Not every organization listed will be involved in every tourism-related action, but specific statewide actions will require collaboration with specific groups on a "big picture," broad policy level. Once "big picture" direction is established at the state level, much of the actual implementation will happen both at the state and regional levels.

At the regional level, key partners outside the “core team” who need to be involved include the following:

- ♦ Local elected officials
- ♦ Tribal representatives, tribal colleges
- ♦ Local staff for state/federal agencies
- ♦ Local & regional economic development organizations
- ♦ Lewis & Clark Bicentennial groups
- ♦ Local sportsmen’s organizations
- ♦ Local conservation organizations
- ♦ Local schools/youth
- ♦ Special interest groups (bicycle clubs, etc.)
- ♦ Interested citizens

If representatives from these various stakeholder groups participate in planning and implementation of specific actions identified in this Strategic Plan, the vision and goals identified by Montana citizens can be realized successfully. The anticipated results will be significant economic development benefits, and enhanced quality of life benefits, for all Montanans (Figure 4.6).

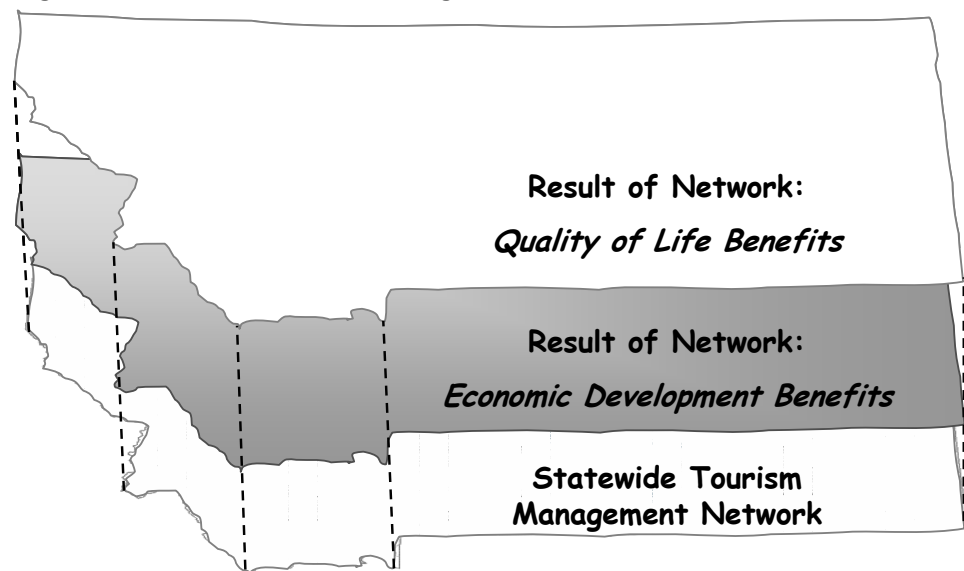


State Capitol

Fig. 4.5: Statewide Tourism Management Network and Its Residual Benefits

The Benefits of an Enhanced Statewide Tourism Management Network

Figure 4.6 at right shows the statewide tourism management network described in this chapter, plus two “overlays” of benefits. Successful implementation of this enhanced tourism management network will result in achievement of the vision for tourism and recreation in 2007, in the context of the guiding principles. It also will provide economic development and quality of life benefits for all Montanans.



Sidebar 4.1: Montana Tourism & Recreation Stakeholder Groups

Blackfeet Tribe	Montana Campground Owners Association	Montana Tourism Coalition (MTC)
Bureau of Land Management (BLM)	MT Dept. of Agriculture (DOAg)	Montana Tourism & Recreation Initiative (MTRI)
Bureau of Reclamation (BOR)	MT Dept. of Commerce (DOC):	Montana Tribal Tourism Alliance (MTTA)
Chambers of Commerce (CC)	- Promotion Division	Montana Wilderness Association
Clark Fork Coalition	- Business Resources Division	Montana Wildlife Federation
Convention & Visitors Bureaus (CVBs)	MT Dept. of Fish, Wildlife & Parks (FWP)	Montana Wildlife Society
Custer Country	MT Dept. of Labor & Industry (DLI)	Montana/Wyoming Tribal Leaders Council
Ducks Unlimited	MT Dept. of Natural Resources/Conservation	National Park Service (NPS)
Fishing Outfitters Assn. of Montana (FOAM)	MT Dept. of Revenue (DOR)	National Parks Conservation Assn.
Flathead Valley Community College	MT Dept. of Transportation (MDT)	Peoples Center (Flathead Reservation)
Ft. Peck Reservation	MT Economic Developers Assn. (MEDA)	Predator Conservation Alliance
Ft. Belknap Reservation	Montana Education Association	Rocky Boys Reservation
Glacier Country	Montana Fish & Wildlife Commission	Rocky Mountain Elk Foundation (RMEF)
Gold West Country	Montana Governor's Office of Economic Oppt'y	Russell Country
Greater Yellowstone Coalition	Montana Grain Growers Association	Salish/Kootenai Tribes
Grown in Montana	Montana Heritage Commission	Small Business Development Centers (SBDC)
L&C Bicentennial Commission	Montana Historical Society (MHS)	State Historic Preservation Office (SHPO)
- State Commission	Montana Innkeepers Assn. (MIKA)	Tour Operators (Off the Beaten Path, etc.)
- Regional Bicentennial Commissions	Montana League of Cities & Towns (MLCT)	Tourism Advisory Council (TAC)
L&C Trail Heritage Foundation Chapters	Montana Legislature – Committee staff	Transportation Carriers (Air, Rail, Bus, Car Rental)
Little Shell Tribe	Montana Office of Public Education	Tribal Colleges
Made in Montana	Montana Outfitters & Guides Assn. (MOGA)	Trout Unlimited
Missoula Cultural Council	Montana Ranch Vacation Association	University of Montana
Missouri River Country	Montana Recreation & Parks Assn. (MRPA)	- Institute for Tourism & Rec'n Research
MT Agricultural Business Assn. (MABA)	Montana Restaurant Association	- Bureau of Business & Economic Research
Montana Arts Council (MAC)	Montana Retail Association	U.S. Army Corps of Engineers (COE)
Montana Assn. of Counties (MACo)	Montana Rural Development Partners	U.S.D.A. Forest Service (USFS)
Montana B&B Association	Montana Shares	U.S.D.A. Rural Development (RD)
Montana Beef Commission	Montana Ski Areas Association	U.S. Economic Development Admin. (EDA)
Montana Community Foundation	Montana Snowmobile Association	U.S. Fish & Wildlife Service (USFWS)
Montana Board of Outfitters (Licensing)	Montana State University/Extension Service	Walleyes Unlimited
Montana Bowhunters Association	Montana Stock Growers	Yellowstone Country